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ACCESS (AUTOMATED QUALITY OF CARE EVALUATION SUPPORT
SYSTEM) A AND S APPOINTMENT FUNCTIONS COURSE WORKBOOK
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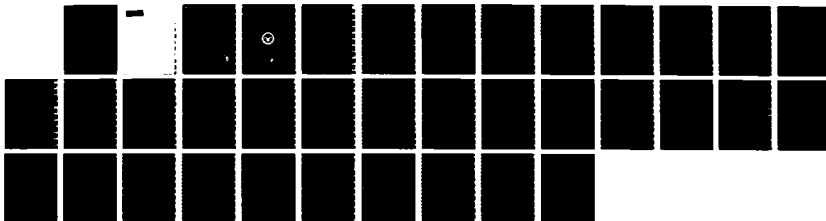
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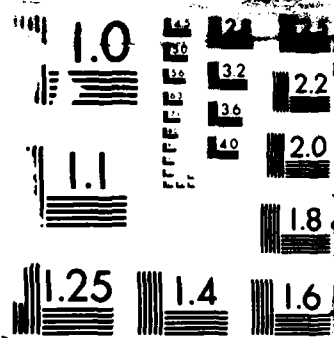
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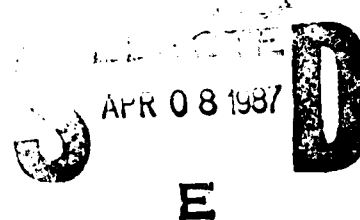
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**AQCESS
A&S APPOINTMENT FUNCTIONS**

COURSE WORKBOOK



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A&S APPOINTMENT FUNCTIONS COURSE WORKBOOK

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INTRODUCTION TO THE A&S APPOINTMENT FUNCTIONS COURSE WORKBOOK

The A&S Appointment Functions Course Workbook is designed to train designated clinic personnel how to use the appointment functions: booking, cancelling, and scanning (searching) for pending appointments, and using the Check-In Menu.

The Workbook is divided into five separate lessons: Identify a Patient, Book Appointments, Scan Appointments, Cancel Appointments, and Check-In Menu. There is an introduction explaining what will be covered in the lessons, and each lesson contains step-by-step, sequential practice exercises that allow you to learn all the different functions.

A User's Tip is included in some of the exercises to add clarification of procedures or terms. There is a quiz at the end of the lessons to check your progress.

The Course Workbook will be used in the initial on-site training. After the training, the Workbook can be used as a self-instructional resource for learning the Appointment Functions.

Here is a brief summary of the five lessons:

1. Identify a Patient

In this lesson, you will learn to identify and locate a patient who has already been registered in the system using the Patient Identification (PIID) screen.

2. Book Appointments

How do you find an available appointment for a patient? This lesson teaches you all the different search criteria you can use to find an available time period.

3. Scan Appointments

In this lesson you will learn to search for a patient's pending appointments.

4. Cancel Appointments

People cancel appointments for a variety of reasons. In this lesson you will learn to search for a patient's pending appointment and cancel it.

5. Check-In Menu

With the Check-In Menu, you will learn three separate features: check-in individual patients as having kept or not shown up for their appointments, perform batch check-ins, and register walk-in patients.

If you are using the Course Workbook in a training situation, be sure to ask your trainer(s) any questions you might have. Jot down notes, reminders, hints, or any other information you feel is important.

If you are using the Course Workbook as a self-instructional tool, read all explanations, User's Tips, and directions very carefully. You should direct any questions you might have to your hospital's System Manager. Again, jot down notes reminders, hints, or any other information you need to learn A&S efficiently.

USER'S TIP:

The quickest way to learn Appointing & Scheduling is to practice and play with the system as much as possible. Once you have gone through the Course Workbook, do it again. Repeat the exercises you find difficult.

GOOD LUCK! ENJOY YOUR LEARNING!

HELPFUL HINTS YOU SHOULD KNOW

1. There are ten Health Care Providers for each name given. The HCP name followed by the suffix (A - K) is provided. The short name for all HCPs consists of six letters -- the first five of the last name plus the first letter of the first name.

For example, here is a list of all ten HCP Newman's (A - K):

SHORT NAME	COMPLETE NAME
NEWMAA	NEWMAN, ANDREW
NEWMAB	NEWMAN, BERNARD
NEWMAC	NEWMAN, CHASE
NEWMAD	NEWMAN, DERMEN
NEWMAE	NEWMAN, ERWIN
NEWMAF	NEWMAN, FRANCIS
NEWMAG	NEWMAN, GIGI
NEWMAH	NEWMAN, HOLLY
NEWMAI	NEWMAN, IRWIN
NEWMAJ	NEWMAN, JOSEPH

Each trainee will be given a different suffix (letter) so that no two will be using the same Health Care Provider.

2. There are ten patients for each name given. Both males' and females' first names begin with A - K. For example, the practice exercise might deal with patient Carter (A - K). In this case, the Carters are females. Their names include:

1. CARTER, ANDREA
2. CARTER, BARBARA
3. CARTER, CAROL
4. CARTER, DEBBIE
5. CARTER, ELIZABETH
6. CARTER, FAY
7. CARTER, GERTRUDE
8. CARTER, HARRIET
9. CARTER, IRENE
10. CARTER, JOY

The suffix you are assigned at the beginning of the training will be used throughout the training.

INTRODUCTION TO APPOINTING & SCHEDULING

The Appointing & Scheduling Subsystem automates the outpatient clinic scheduling process as well as the appointment booking process.

The main function of the A&S Subsystem is the Booking function. Before any appointments can be booked, a Health Care Provider's schedule must be created for a given clinic. Schedules have already been created for you in the Training Database so you will begin with the appointment functions.

The Book Appointments function offers a great deal of flexibility in searching for an available appointment. All you need to enter is the patient name and the name of the clinic. A specific Health Care Provider, appointment type, date, day, and time may be entered to narrow the search even further. Once the appropriate appointment time has been located, all you need to do is enter the number corresponding to the desired time.

You may cancel appointments without ever having to leave the Book Appointments screen, and the only required data for cancelling an appointment is the cancellation reason.

As you can see, A&S automates all aspects of the appointment booking process.

At times a patient may call to check the date and time of an appointment or to confirm an appointment. Both of these can be done through the Scan Appointments function. By simply entering the patient's name, all pending appointments can be located.

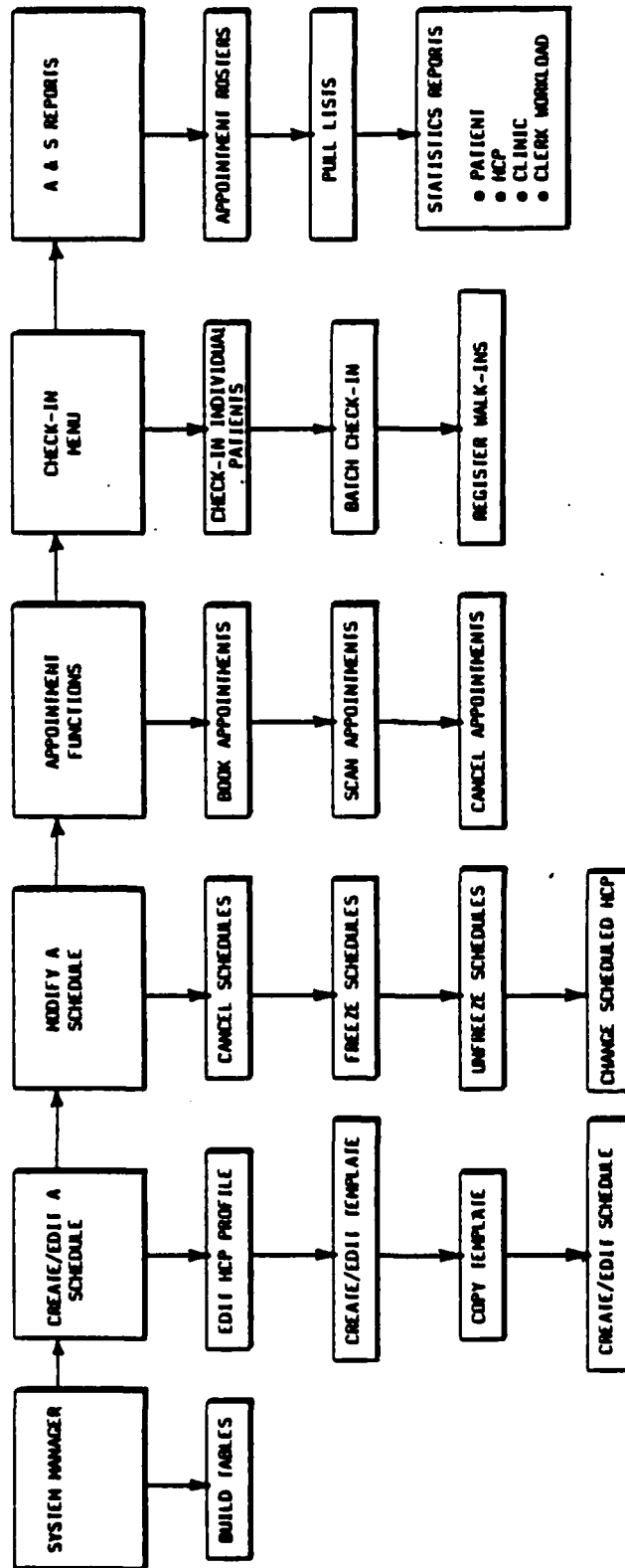
How do you keep track of which patients kept and did not keep their appointments, and what do you do with walk-in patients? Simple -- the Check-In Menu. The Check-In Menu allows you to record patients who kept their appointments and those who were no-shows and register walk-in patients.

Appointing & Scheduling Reports provide a comprehensive management tool by compiling and organizing valuable outpatient clinic data. A&S Reports fall into three main categories: appointment rosters, pull lists, and statistical reports.

- o Appointment Rosters furnish a list of appointments by clinic or by provider for a given day.
- o Pull lists offer a quick automated listing of all medical records that must be pulled for appointments on a certain day.
- o Statistical Reports provide management with a means to review patients seen and analyze clinic workload activities.

The Appointing & Scheduling Module of AQCESS automates the diverse clinic scheduling and appointing functions for the outpatient facilities at a hospital.

APPOINTING & SCHEDULING FLOW CHART



A&S COURSE WORKBOOK

Lesson No. 1: Identify a Patient

OBJECTIVES: After completing this lesson you will be able to:

- 1.1) Identify a patient in the system by name fragment.
- 1.2) Select a patient from the Candidate List screen and use search limitation processes.

INSTRUCTIONAL OVERVIEW:

Refer to Sections 2.1, 2.2, 2.3, 2.4, 2.5, and 2.6 of the Training Aid.

The Patient Identification (PTID) screen is used to identify patients currently in the system. A particular record can be accessed by Name or by the Sponsor's Social Security Number and FMP. A number of searches are also available. Name fragment search enables you to access a patient record by the full name, any part of the last name, or part of the last name with part of the first. When a search is performed on a patient name or name fragment, all qualifying patient records are displayed on a candidate list. You select the patient from this list. Once you select a patient from the Candidate List screen the Outpatient Registration screen for that patient is displayed.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 1.1: Identify a Patient by Name Fragment Search

SITUATION: Ms. Carter (A-J) calls your Clinic to verify her registration data. You must locate her record by using the PTID screen to do a name fragment search.

DIRECTIONS:

- 1) Select "O", Appointing & Scheduling from the AQCESS Main menu. Press Return.
- 2) Select "E", Outpatient Registration, from the Appointing & Scheduling Menu.
- 3) The PTID screen is displayed. Enter "Carter" at PATIENT NAME and press Return.
- 4) Press Entry Done; the cursor is at SELECTION. Press Return.
- 5) The Candidate List screen is displayed containing all those patients who meet the criteria specified on the PTID screen. To select a patient, type in the number associated with the patient and press Return.
- 6) The next screen is the Outpatient Registration screen. Take a minute to view the screen and notice what data it contains.
- 7) Press Cancel twice to redisplay the Appointing & Scheduling Main Menu.

USER'S TIP:

The PTID screen is used to quickly access a patient's record. Patient Name is one of the available search criteria. The more criteria specified, the fewer candidates will appear on the Candidate List screen. To select from the Candidate List screen, you simply choose the number corresponding to the selected patient.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 1.2: Register a New Patient

SITUATION: You are a sponsor (FMP 20) being registered. Use your last name, first name, and the middle initial A for identification. Use your SSN, replacing the last two digits with "00". Your patient category is F11 (Air Force), N11 (Navy), A11 (Army) and your Unit ID/Ship Identification Code is 20860.

Press Help through all the fields. The required fields include: Address, one phone number (either Home or Work), Patient Category, and one Medical Record Location.

DIRECTIONS:

- 1) Select "E", Outpatient Registration, from the Appointing and Scheduling Main Menu.
- 2) The Patient Identification (PTID) screen is displayed. Complete the screen. At SELECTION, enter "N" for New Registration and press Return.
- 3) Enter data in the fields to complete the Registration screen. Press Help in any field for more information.
- 4) Enter the location of your medical records. Press Help to display all the valid options.
- 6) Press Return at ENTER SELECTION to store the data.

USER'S TIP:

When registering a dependent, a skeleton registration will be created for the sponsor. Should the sponsor later be registered in a clinic, some of his/her registration data will already be in the system.

If another dependent from the same sponsor is registered, demographic data will default from the sponsor.

NOTE: Pressing the Cancel key at any time before storing the data in step #6 means that none of the data has been stored, and the patient has not been registered.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 1.3: Book Appointment Screen

In Practice Exercise 2.2, you will be booking an appointment for yourself. Three screens will appear before you arrive at the Book Appointment screen:

1. PTID (Patient Identification)
2. Outpatient Candidate List
3. Outpatient Registration

You have already seen all three screens in Practice Exercises 1.1 and 1.2.

To familiarize you with the Book Appointment screen, here is a worksheet using the screen. Learn all the fields before you begin working on the computer and the exercises for the Booking, Scanning, and Cancelling functions will be much easier.

SITUATION: You have been feeling rundown lately, tired and irritable for no apparent reason. You decide you need a Physical exam as soon as possible in the Primary Care Clinic with HCP Welby sometime in the morning.

DIRECTIONS:

Using the situation given above, fill in all the applicable fields on the worksheets provided and then select an available appointment.

APPT & SCHED		DATE		TIME
BOOK APPOINTMENT				
PATIENT		CAT	HOME PHONE	
FMP	SSN		WORK PHONE	
CLINIC	HCP	APPT TYPE	APPT REASON	
FROM DATE	THRU DATE	FROM TIME	THRU TIME	
DAY OF WEEK MTWTHFSSN		REFERRED FROM		
*** PENDING APPTS ***				
#	CLINIC	HCP	TYPE	DATE TIME
0				
1				
2				
3				
4				
5				
6				

7 - NEXT PAGE		8 - PREVIOUS PAGE		9 - VIEW AVAILABLE
10 - CANCEL APPT				
ENTER SELECTION:				

Select the number of the appointment type you want.

APPT & SCHED		DATE		TIME	
BOOK APPOINTMENT					
PATIENT		CAT		HOME PHONE	
FMP		SSN		WORK PHONE	
CLINIC PCC	HCP WELBY	APPT TYPE PHY	APPT REASON TIRED, RUNDOWN		
FROM DATE T	THRU DATE T + 30	FROM TIME 0700	THRU TIME 1200		
DAY OF WEEK MTWTHFSSN		REFERRED FROM			
*** AVAILABLE APPTS ***					
#	CLINIC	HCP	TYPE	DATE	TIME
0	PCC	WELBY	PHY	30 SEP 86	0900
1	PCC	WELBY	PHY	30 SEP 86	0930
2	PCC	WELBY	PHY	30 SEP 86	1000
3	PCC	WELBY	PHY	1 OCT 86	0900
4	PCC	WELBY	PHY	1 OCT 86	0930
5	PCC	WELBY	PHY	1 OCT 86	1000
6	PCC	WELBY	PHY	2 OCT 86	0900

7 - NEXT PAGE		8 - PREVIOUS PAGE		9 - VIEW AVAILABLE	
10 - CANCEL APPT					
ENTER SELECTION:					

A&S COURSE WORKBOOK

Lesson No. 2: Book Appointments

OBJECTIVES: After completing this lesson you will be able to:

- 2.1) Book an open appointment for a registered patient for a clinic.
- 2.2) Update patient registration and Book appointments for a patient with a specific HCP.
- 2.8) Book a second appointment for a patient on a particular day.
- 2.3) Book an appointment for a patient that requires a referral.
- 2.4) Reschedule an appointment.
- 2.5) Overbook appointments.

INSTRUCTIONAL OVERVIEW:

Refer to Section 3.1 of the Training Aid.

Book Appointments is an extremely flexible feature. The only required data for booking an appointment is the patient's name and the name of the clinic. All the patient's pending appointments are displayed as soon as the Book Appointments screen is accessed.

You can further limit your search for an available appointment by entering more criteria: appointment type, date, time, and day of appointment.

The system displays all available appointments, seven at a time, that fit the criteria specified. You may page back and forth through this list of available appointments until you find an acceptable appointment for the patient. Once an appointment has been booked, a list of that appointment and all the patient's other pending appointments is displayed. From the Pending Appointments screen, you may cancel an appointment.

The Book Appointments, Cancel Appointments, and Scan Appointments screens are the same. Only use Book Appointments when you are going to book an appointment. In the future, selecting the Book Appointments function will automatically activate a DEERS eligibility check.

The Cancel Appointments and Scan Appointments functions will not activate a DEERS eligibility check.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.1: Book an Open Appointment for a Registered Patient

SITUATION: Book a Routine appointment in the **Internal Medicine Clinic** as soon as possible for yourself. (Remember to select a provider with the letter you have been assigned, for example "Burkea, Burkeb," etc.)

DIRECTIONS:

- 1) Since we are booking appointments, select option "B" from the A&S Main Menu. Press Return.
- 2) The PTID screen is displayed. Enter your name at the first field and press Return. Press Entry Done and then press Return at ENTER SELECTION to display the Candidate List screen.
- 3) Select yourself from the list and press Return.
- 4) The Outpatient Registration screen is displayed. Note the information; this is when you would update any registration information. Press Return at ENTER SELECTION.
- 5) The Booking Appointments screen is displayed; any pending appointments the patient may have would be displayed here. The cursor is at CLINIC; enter "INT" for Internal Medicine.
- 6) The cursor is now at HCP; press Return until you arrive at the APPT TYPE field.
- 7) At APPT TYPE, enter "ROT" for Routine.
- 8) Press Entry Done to display all available Routine appointments within this clinic.
- 9) Select an appointment by entering the corresponding number and press Return.
- 10) The system prompts you with "Book?". Enter "Y". (Do NOT press Return.)
- 11) The appointment you just booked is displayed under Pending Appointments.
- 12) Press Return to access the PTID screen.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.2: Update Outpatient Registration and Book a Particular Appointment

SITUATION: Ms. Evans (A-J) would like an appointment in OB/GYN with HCP Simms (A-J) for a Routine exam and for a Follow-up visit. Her new work phone number is 301-926-1222. Update her registration information and then book her Routine and Follow-up appointments.

DIRECTIONS:

- 1) Select "B", Book Appointments from the A&S Main Menu.
- 2) Enter the name "Evans" in the PATIENT NAME field of the PID screen. Press Return and then Entry Done.
- 3) Press Return at ENTER SELECTION.
- 4) Select your patient from the Candidate List screen and press Return.
- 5) The Outpatient Registration screen for the patient is displayed. Type "Work" at ENTER SELECTION to arrive at the WORK PHONE NUMBER field.
- 6) Change the work phone number and press Return.
- 7) Press Entry Done and then Return at ENTER SELECTION.
- 8) The Book Appointment screen is displayed; all the patients' pending Appointments are displayed. Continue this exercise on the next page.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.2 A: Update Outpatient Registration and Book an Appointment with a Specific HCP.

SITUATION: Now that you have updated Ms. Evans' work phone number, book a Routine exam in OB/GYN with HCP ~~Simms~~ (A-J).

DIRECTIONS:

- 1) The cursor is at CLINIC. Enter the clinic short name.
- 2) Enter the HCP short name and press Return.
- 3) At APPT TYPE, enter the appointment type short name. (Press Help if you're not sure what the short name is.)
- 4) Press Entry Done.
- 5) Choose an appointment by entering the number corresponding to the appointment and press Return.
- 6) "Book?" appears at the bottom of the screen. Enter "Y". Do not press Return.
- 7) All of patient Evans' pending appointments, including the one you just booked, are displayed.
- 8) Continue this exercise on the next page.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.2 B: Book a Second Appointment

SITUATION: Ms. Evans (A-J) would also like to schedule a second appointment for a **Follow-up** visit with **HCP Simms (A-J)**. Due to her demanding schedule, she can only make this appointment on **Friday**.

DIRECTIONS:

- 1) To schedule a follow-up appointment for Ms. Evans, type "ALL" at ENTER SELECTION and press Return.
- 2) The cursor goes to the first field you can update. In this case, that is CLINIC. Press Return until the cursor is at the APPT TYPE field.
- 3) Enter the Appointment Type. If you don't know the short name for Follow-up, press Help and select it from the table.
- 4) Press Return until the cursor is at DAY OF WEEK. Since Ms. Evans can only make it on Friday, enter "F" in this field and press Return.
- 5) Press Entry Done to display all the available appointments.
- 6) Select an appointment for Ms. Evans and book it.
- 7) All pending appointments will be displayed. Notice the sub-menu on the bottom of the page. You may book another appointment, page through available or pending appointments, and/or cancel an appointment.
- 8) Press Return to access the PTID screen. Press Cancel to return to the Appointing and Scheduling Main Menu.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.3: Book an Appointment that Requires a Referral

SITUATION: Patient **Carter (A-J)** wants a **New** appointment with HCP **Newman (A-J)** in the **Psychiatric** clinic within the next two weeks. Patient Carter (A-J) was referred by **Johnson (A-J)**. Locate Patient Carter's record by FMP and SSN.

CARTER,ADA	20	111010130
CARTER,BERNICE	20	111010131
CARTER,CONNIE	20	111010132
CARTER,DENISE	20	111010133
CARTER,EARLENE	20	111010134
CARTER,FAYE	20	111010135
CARTER,GAIL	20	111010136
CARTER,HOLLY	20	111010137
CARTER,IRENE	20	111010138
CARTER,JOY	20	111010139

DIRECTIONS:

- 1) Select "B", Book Appointments from the A&S Main Menu.
- 2) Enter Patient Carter's FMP and SSN on the PTID screen. Press Return and then press Entry Done. Press Return at SELECTION.
- 3) Press Return at the Outpatient Registration screen.
- 4) Enter the Clinic, HCP's short name, and appointment type.
- 5) At the REFERRED FROM field enter "H*C*PSY" and then press Help. A list of all providers in the Psychiatric Clinic is displayed.
- 6) Enter "H*Johnson (A-J)" in the REFERRED FROM field and press Return.
- 7) A list of all available New Appointments for HCP Newman (A-J) is displayed.
- 8) Select an appointment and enter "Y" at the "Book?" prompt.
- 9) Press Return and then Cancel to access the A&S Main Menu.

USER'S TIP:

Referrals for appointments can be made by an HCP or by a clinic. You must enter H* Name of Provider or C* Name of Clinic in the REFERRED FROM field.

There are 5 separate Help messages in the REFERRED FROM field:

1. By entering "H*" and pressing Help, a list of all Health Care Providers is displayed.
2. By entering "C*" and pressing Help, a list of all clinics is displayed.
3. By entering "H*C* (name of clinic)" and pressing Help, a list of all HCPs in a given clinic is displayed.
4. By entering "H*S* (name of specialty)" and pressing Help, a list of all HCPs with a given clinical service code is displayed.
5. By entering "H*S*" and pressing Help, a list of all clinical service codes is displayed.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.4: Reschedule an Appointment

SITUATION: Mr. Robinson (A-J) would like to reschedule an appointment. He currently has an appointment on 10 Oct 86 with HCP Sword (A-J) in the Family Practice Clinic for a Physical. He would like to change it to 8 Oct 86 at 0830. We will first book the new Physical on 8 Oct 86 and then cancel the one on 10 Oct 86.

DIRECTIONS:

- 1) Select "B", Book Appointments, from the Appointing & Scheduling Main Menu.
- 2) Call up the patient's Outpatient Registration screen. Press Return.
- 3) The Booking Appointment screen is displayed. Enter the clinic, HCP, Appointment type, and date.
- 4) Select the 0830 appointment from the list of Available Appointments and book it.
- 5) Both appointments for Physicals are listed under Pending Appointments. At ENTER SELECTION, enter "10", Cancel Appointment, from the sub-menu.
- 6) "# of Appointment to Cancel" is the message that appears. Enter the number of the appointment you want to cancel.
- 7) The cursor is at CANCEL REASON. Enter the Cancel Reason. (Press Help if you're not sure of the short name.)
- 8) All of patient Robinson's appointments along with the pending physical on 8 Oct 86 are redisplayed.
- 9) Continue this exercise on the next page.

USER'S TIP:

After cancelling an appointment, the system allows you to view pending appointments. At this time you are able to cancel another appointment or book a new appointment without returning to the A&S Main Menu.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.4 A: Reschedule an Appointment

SITUATION: Wait a minute! Mr. Robinson (A-J) is terribly sorry, but he just realized he has to pick up his mother-in-law at 0800 on the morning of Oct 8 86. Book him a Physical with HCP Sword (A-J) in Family Practice after 0900 and cancel his 0830 appointment.

DIRECTIONS:

- 1) Select "9", View Available, from the Book Appointments Sub-Menu at the bottom of the screen.
- 2) All available appointments that fit the criteria already entered previously on the Book Appointments screen are redisplayed.
- 3) Select Mr. Robinson's Physical with HCP Sword (A-J) in the Family Practice Clinic after 0900.
- 4) Answer "Y" to the "Book?" prompt.
- 5) All of patient Robinson's available appointments are displayed including the two physicals on 8 Oct 86. Select "10", Cancel Appointment, from the sub-menu.
- 6) Enter the number of the appointment to be cancelled.
- 7) Enter the Cancel Reason.
- 8) All pending appointments are displayed.
- 9) Press Return and then Cancel to redisplay the A&S Main Menu.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 2.5: Overbook Appointments

SITUATION: The patients listed below must have appointments at the times indicated on 2 Oct 86. Since these appointment times are already booked, it will be necessary to overbook the appointments. You'll have to register Patient Rogers in the system before he/she can be given an appointment; supply all the necessary registration information for Patient Rogers.

<u>Patient</u>	<u>Clinic</u>	<u>HCP</u>	<u>Appt Type</u>	<u>Appt Reason</u>	<u>Time</u>
Lannon	INT	Burke (A-J)	New	None	0830
Rogers	INT	Burke (A-J)	ROT	Emergency	1020

DIRECTIONS:

- 1) Select "B", Book Appointments, from the Appointing & Scheduling Main Menu.
- 2) Bring up the patient's record (or register the new patient).
- 3) Enter the Clinic and HCP names.
- 4) Enter the Appointment Type.
- 5) Enter the date in the FROM DATE and THRU DATE fields.
- 6) Enter the time in the FROM TIME and THRU TIME fields.
- 7) Press Entry Done.
- 8) "No Appointments Found For These Criteria - Search for Overbooks?" appears at the bottom of the screen. Enter "Y".
- 9) The available overbook appointments are displayed. Enter the number of the appointment and press Return.
- 10) The "Overbook?" prompt is at the bottom of the screen. Enter "Y".
- 11) All the patient's pending appointments along with the overbook appointment you just made are displayed.
- 12) Press Return and then Cancel to return to the A&S Main Menu.

USER'S TIP:

- a. You must enter the appointment time indicated at both the **FROM TIME** and **THRU TIME** fields on the Book Appointment screen in order for the system to search for an Overbook appointment.
- b. The HCP is a required field for all Overbook appointments.
- c. An Overbook implies that the HCP will have to work a patient into an already full schedule. Every attempt should be made to arrange a suitable available appointment without overbooking.
- d. Remember that Overbooks can only be made to an HCP's Appointment Type if the Appointment Type has been set up in the HCP Profile and scheduled to accept Overbooks.
- e. If an HCP will no longer take overbooks to specific appointment types, you may make this change in the HCP Profile. However, schedules already existing before the change was made for this HCP will still accept overbook appointments.

A&S COURSE WORKBOOK

Lesson No. 3: Scan Appointments for a Patient

OBJECTIVES: After completing this lesson you will be able to:

- 2.1) Scan for an appointment.
- 2.2) Scan for a particular appointment.

INSTRUCTIONAL OVERVIEW:

Refer to Section 3.4 of the Training Aid.

Scan Appointments allows you to search for a patient's pending appointments. By entering only a patient's name, Appointing & Scheduling can locate all the patient's pending appointments. You can limit your search even further by entering the clinic, provider, or the date range. No data entry is permitted in this function.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 3.1: Scan for an Appointment

SITUATION: Mr. Patton (A-J) called and would like to know the time and scheduled HCP for his Routine appointment this week.

DIRECTIONS:

- 1) Select option "0" from the AQCESS Main Menu to access Appointing and Scheduling.
- 2) Select option "P", Scan Appointments, and press Return.
- 3) The PTID screen is displayed. Enter any information you have about the patient; in this case you know the last name and sex. Enter this and press Return at SELECTION.
- 4) Select the patient from the Candidate List screen by entering the number corresponding to the patient at ENTER SELECTION and press Return.
- 5) The Scan Appointments screen is displayed. All pending appointments for Mr. Patton are displayed.
- 6) Notice what data is stored for pending appointments.
- 7) Press Return and then Cancel to access the A&S Main Menu.

Enter the following information based on this exercise:

Time _____

HCP _____

A&S COURSE WORKBOOK

PRACTICE EXERCISE 3.2: Scan for a Particular Appointment

SITUATION: Mr. Nickles (A-J) would like to know exactly when his appointment is. He knows it's in the **Dermatology** clinic with **HCP Brown** and in the **after-noon** but he doesn't know the exact day and time. Locate Patient Nickles' pending appointments using his FMP and SSN. (See the chart below for Nickles' SSN.)

NICKLES, ADAM	20	111010150
NICKLES, BRAD	20	111010151
NICKLES, CRAIG	20	111010152
NICKLES, DOUG	20	111010153
NICKLES, EUGENE	20	111010154
NICKLES, FRED	20	111010155
NICKLES, GREG	20	111010156
NICKLES, HORACE	20	111010157
NICKLES, IVAN	20	111010158
NICKLES, JULIAN	20	111010159

- 1) Select "P", Scan Appointments, from the Appointing & Scheduling Main Menu.
- 2) Press Return at the PATIENT NAME field.
- 3) Mr. Nickles' FMP is 20 and his SSN is 111010150-111010159. Look him up directly by using the SSN and FMP, and press ENTRY DONE and then Return at ENTER SELECTION.
- 4) The Scan Appointments screen is displayed along with all his pending appointments.
- 5) Press Return and then Cancel to access the Appointing & Scheduling Main Menu.

Enter the following information based on this exercise:

Day _____

Date _____

Time _____

A&S COURSE WORKBOOK

Lesson No. 4: Cancel Appointments

OBJECTIVES: After completing this lesson you will be able to cancel an appointment due to Patient request.

INSTRUCTIONAL OVERVIEW:

Refer to Sections 3.2 and 3.3 of the Training Aid.

Cancel Appointments requires few items that must be entered to search for a patient's pending appointments; all you need to enter is the patient's name. Select the number of the appointment to be cancelled and enter the Cancel Reason.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 4.1: Cancel an Appointment Due to Patient Request

SITUATION: Patient Nickles (A-J) has two **Physicals** scheduled on the same day with the same doctor. The patient would like to **cancel** the **second** appointment, and keep the first appointment with HCP Sword in **Family Practice** on 6 Oct 86.

DIRECTIONS:

- 1) Select option "C", Cancel Appointments from the Appointing & Scheduling Main Menu.
- 2) Call up Patient Nickles' record.
- 3) All of Patient Nickles' Pending Appointments are displayed. Enter the number of the appointment to be cancelled at ENTER SELECTION and press Return.
- 4) The appointment to be cancelled is displayed and the cursor is at CANCEL REASON. Press Help to see a list of all Cancel Reasons. Enter the reason, Patient Request, for cancelling the appointment.
- 5) The Pending Appointment screen displays all other pending appointments for Patient Nickles. (Note that the appointment you just cancelled is no longer displayed).
- 6) Press Return and then Cancel to display the Appointing & Scheduling Main Menu.

A&S COURSE WORKBOOK

Lesson No. 5: Check-In Menu

OBJECTIVES: After completing this lesson you will be able to:

- 5.1) Check-in individual patients.
- 5.2) Batch check-in.
- 5.3) Register walk-ins.

INSTRUCTIONAL OVERVIEW:

Refer to Section 6 of the Training Aid.

Appointing and Scheduling aids the clinics in keeping track of patient appointment activities through the Check-In Menu. The Check-In Menu allows you to perform three separate functions:

- 1. Check-in individual patients
- 2. Batch Check-ins
- 3. Register Walk-ins

With the Check-in Individual Patients option, a clinic employee will enter those patients who were No Shows. The Batch Check-In counts all other patients as having Kept their appointments.

Walk-in patients are registered into the system to account for all patients who were seen but did not have a scheduled appointment.

The Check-in option and the Walk-in option are connected by a limiting time frame of one day between the time that a patient check-in is completed and Walk-in patients can be registered.

For example, a patient check-in may not have been performed for Wednesday's appointments. That means the last day patients were checked in was Tuesday. By Thursday if patients have still not been checked in for Wednesday, no Walk-in patients can be registered on Thursday because it has now been more than one day since patients were checked-in.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 5.1: Check-In Individual Patients

SITUATION: You will now **check-in** the patients scheduled for HCP Burke (A-J) in **Internal Medicine** for **28 Sep 86**. HCP Burke's **0930**, **1020**, and **1500** appointments were **No Shows**; all others were **Kept**.

DIRECTIONS:

- 1) Select option "K", Check-In Menu, from the Appointing & Scheduling Main Menu.
- 2) Select option "K", Check-In Patients, from the Check-In Menu.
- 3) Enter the Clinic, HCP, and Appointment Date.
- 4) At APPT TIME, press Help to view all appointments and their statuses.
- 5) Enter the time of the first No Show appointment.
- 6) PATIENT'S NAME, APPT STATUS, and HCP SEEN default. APPT STATUS is "B". Enter "NS" for that particular appointment.
- 7) Press Entry Done.
- 8) Type "ALL" at ENTER SELECTION to record the next No Show. The cursor moves to CLINIC. Press Return until you arrive at APPT TIME.
- 9) Enter the next appointment time to be checked in as "NS".
- 10) Continue with the same procedures until you finish checking in all three No Shows.
- 11) Press Return at ENTER SELECTION to store the information.

USER'S TIP:

If more than one patient is booked to an appointment, a list of all patients booked for that appointment is displayed. Select the number of the patient, and his/her name will default to the PATIENT NAME field.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 5.2: Batch Check-In

SITUATION: Check-in all other patients for HCP Burke (A-J), in the Internal Medicine Clinic on 28 Sep 86 as having kept their appointments.

DIRECTIONS:

- 1) Select "B", Batch Check-In, from the Check-In Menu.
- 2) At CLINIC, enter the clinic short name.
- 3) Enter the HCP.
- 4) Enter the date.
- 5) Press Return at ENTER SELECTION to store the data.

USER'S TIP:

If you perform a Batch Check-In before the end of the day, the system will only check-in those kept appointments up to the time indicated on the upper right section of the screen.

A&S COURSE WORKBOOK

PRACTICE EXERCISE 5.3: Register Walk-Ins

SITUATION: Register the following Walk-ins who saw HCP Burke in the Internal Medicine Clinic today, Monday, 29 Sep 86. Sherman is a new patient. Be creative! Supply all necessary data for Patient Sherman. No Referral is required for the appointments.

<u>Time</u>	<u>Patient</u>	<u>Appt Type</u>	<u>Appt Reason</u>
0800	Sherman	NEW	Emergency
1040	Evans	FOL	Not Given
1100	Lannon	ROT	Feeling ill

DIRECTIONS:

- 1) Select "W", Register Walk-Ins, from the Check-In Menu.
- 2) The PTID screen is displayed.
- 3) Call up the patient's record. (Register the New patient.)
- 4) The Outpatient Registration screen is displayed. Press Return to access the Register Walk-Ins screen.
- 5) Enter the Clinic and HCP name, appointment date, appointment time, appointment type, and appointment reason.
- 6) Press Return at ENTER SELECTION to store the data.
- 7) Press Cancel to access the Check-In Menu.

USER'S TIP:

This function should be used only if no other appointments are available. Try to book walk-in patients for a regular appointment or an overbook appointment as they come in. Use the Register Walk-In option only if you could not book a patient for an appointment during the day.

If you cannot book a walk-in patient for a regular or overbook appointment, enter the walk-in as soon as possible.

END

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